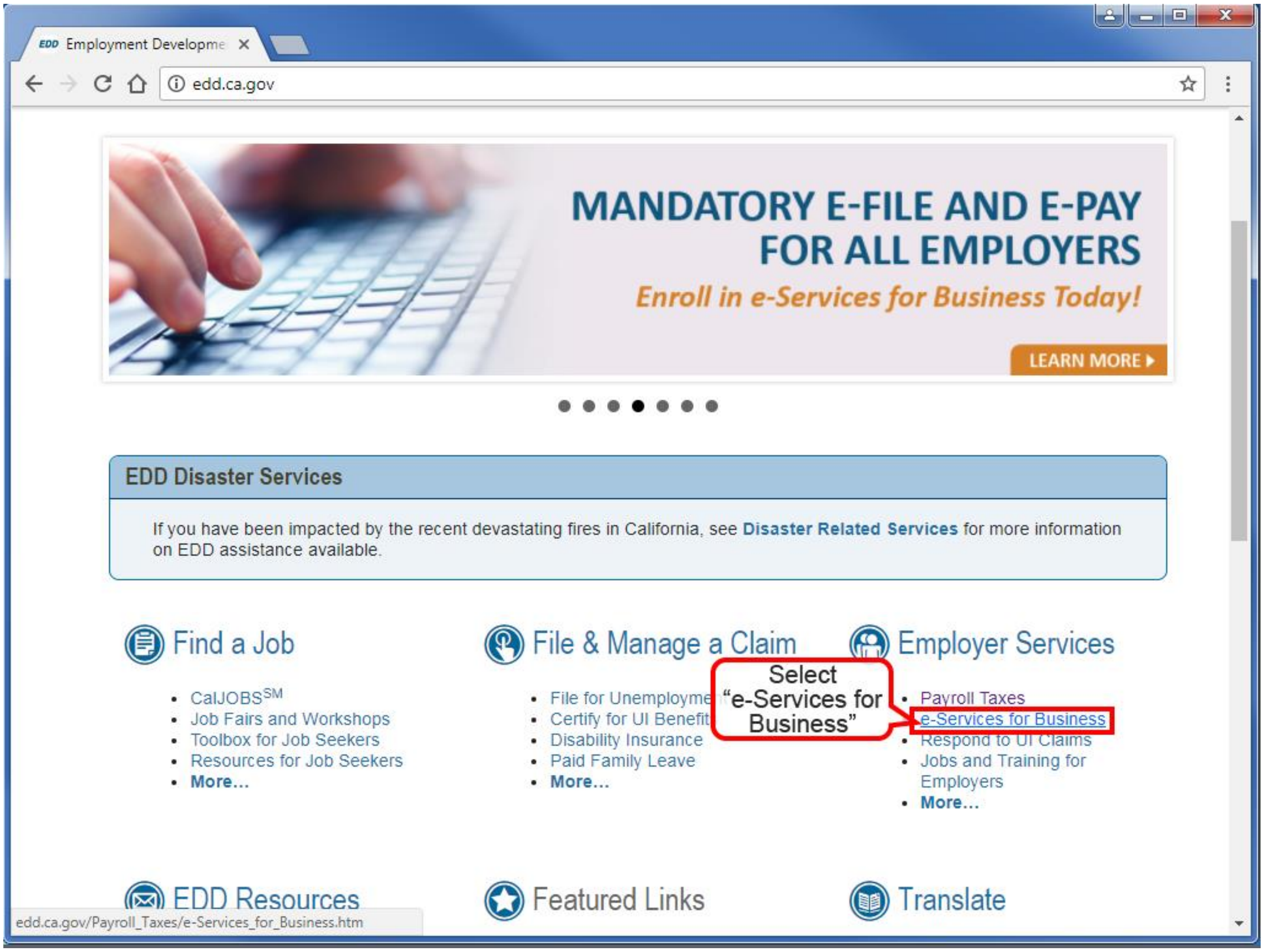
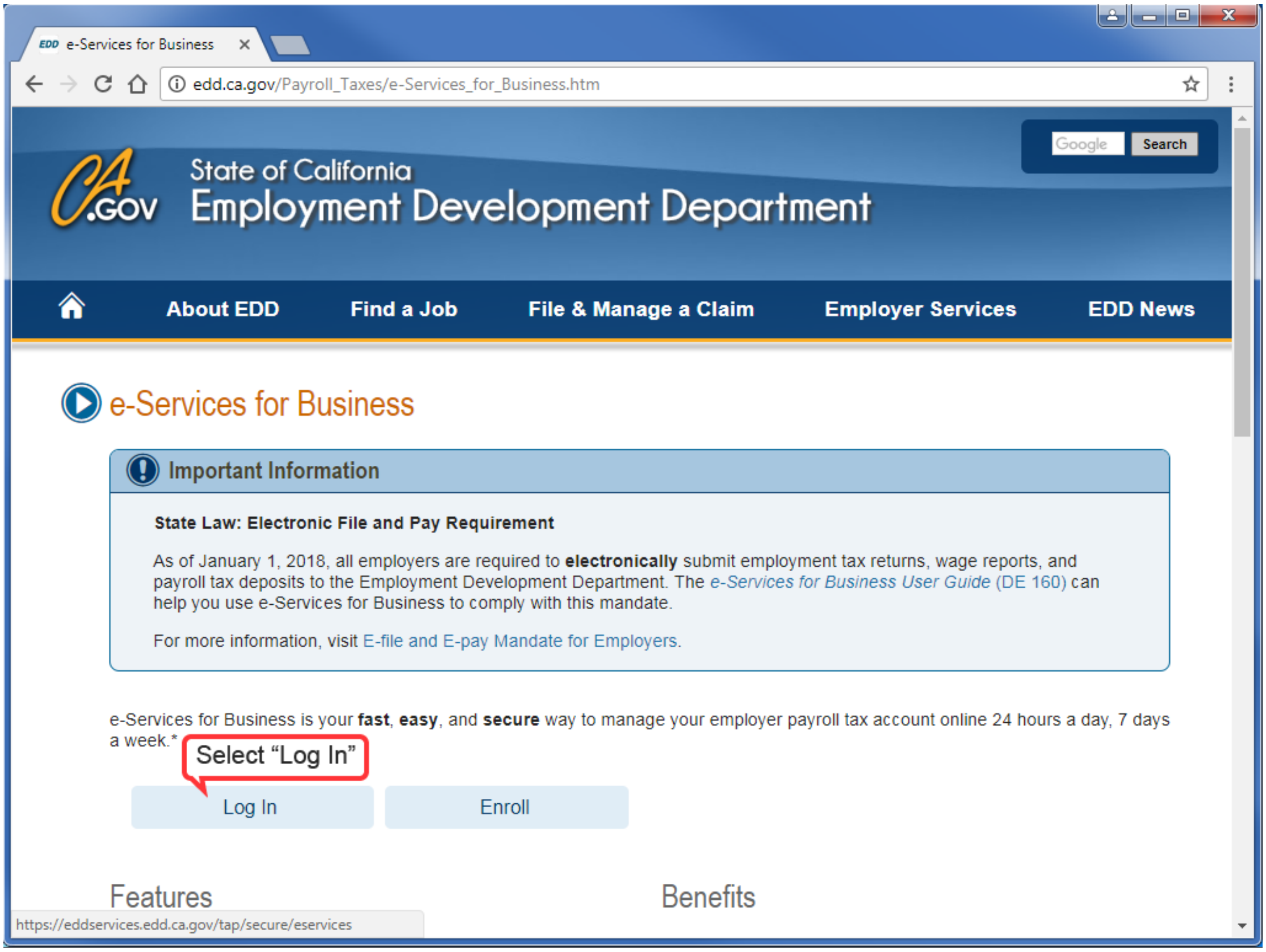
Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial will show you how to complete the enrollment process as an employer representative/payroll agent and how to access a client's account in e-Services for Business.



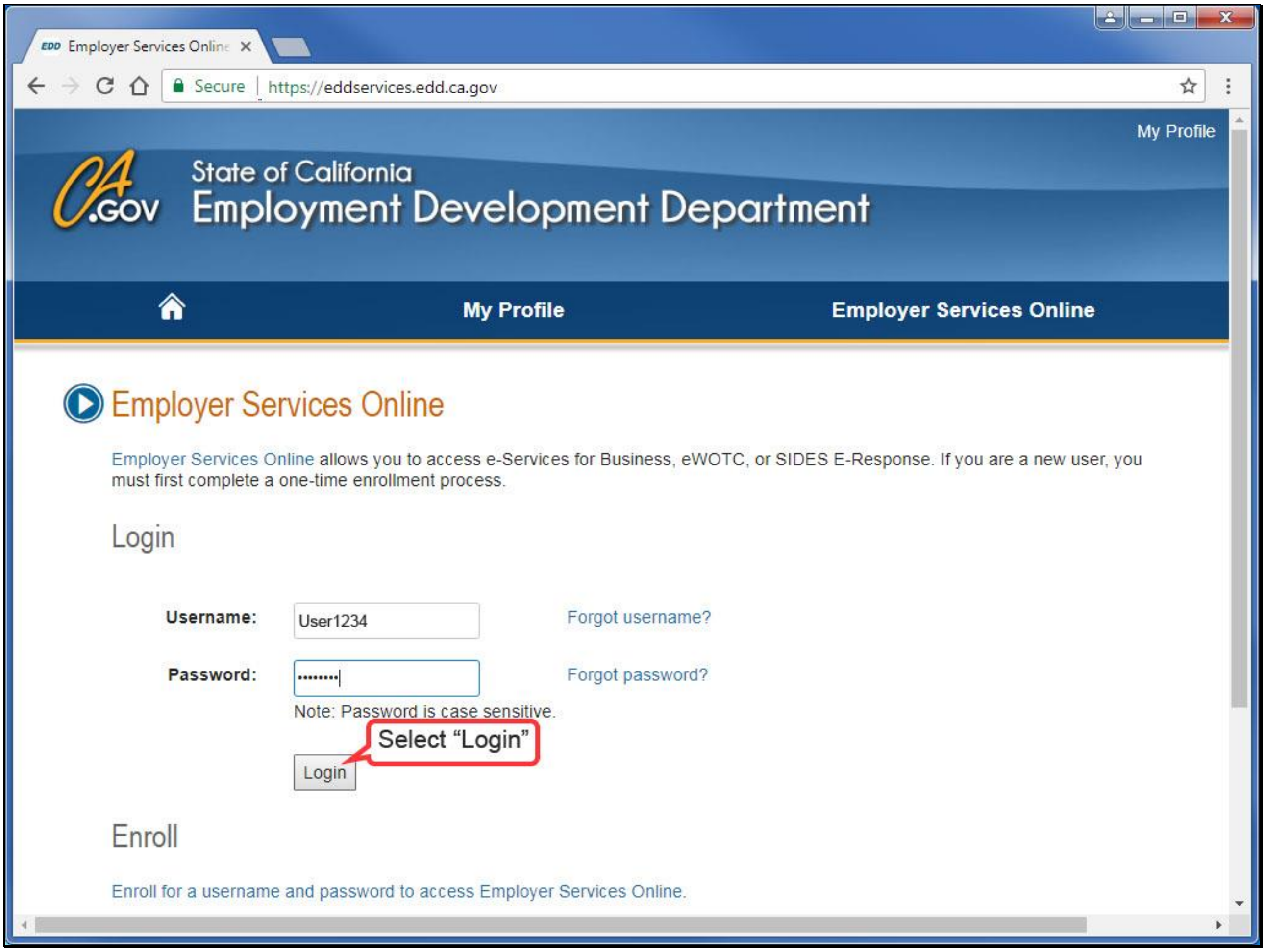
Slide notes

Welcome to the Employment Development Department home page. Notice the “e-Services for Business” link in the Employer Services column. Select the "e-Services for Business" link.



Slide notes

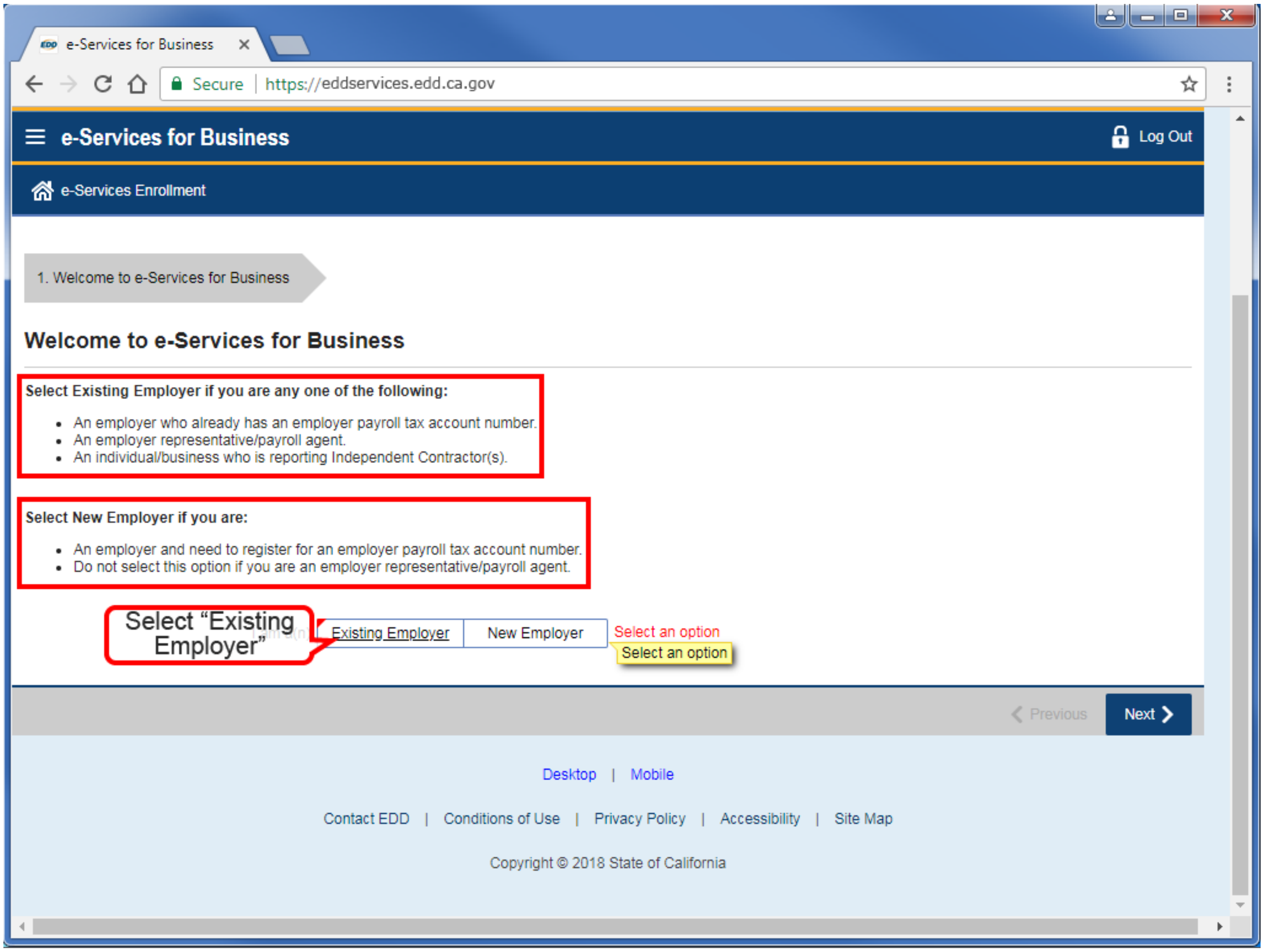
Select the e-Services for Business “Log In” button.



Slide notes

You should already have a username and password established. Enter your username and password. If you would like to learn how to enroll for a username and password refer to the tutorial "I Want to Enroll for a Username and Password to Use Employer Services Online."

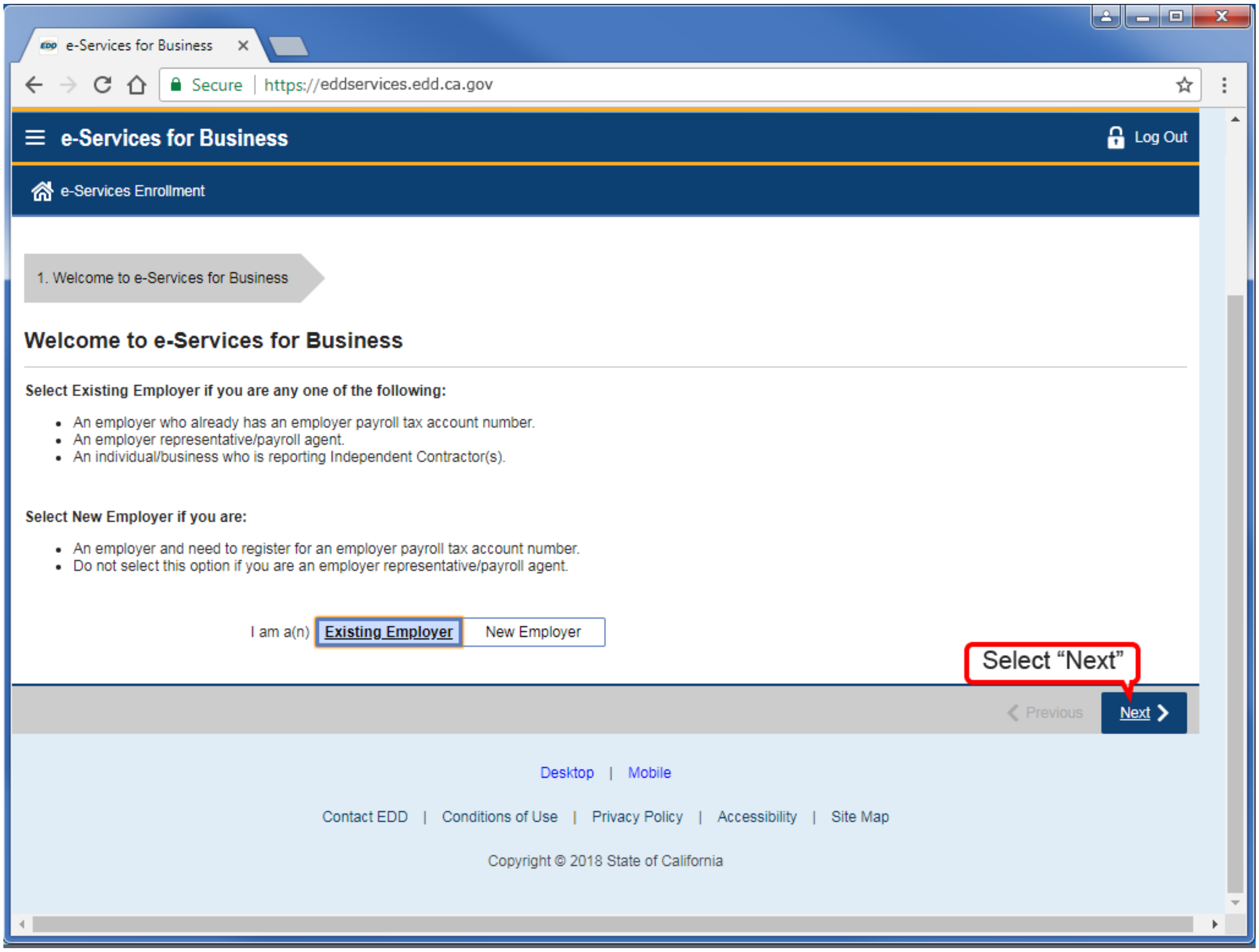
Select "Login" to begin using e-Services for Business.



Slide notes

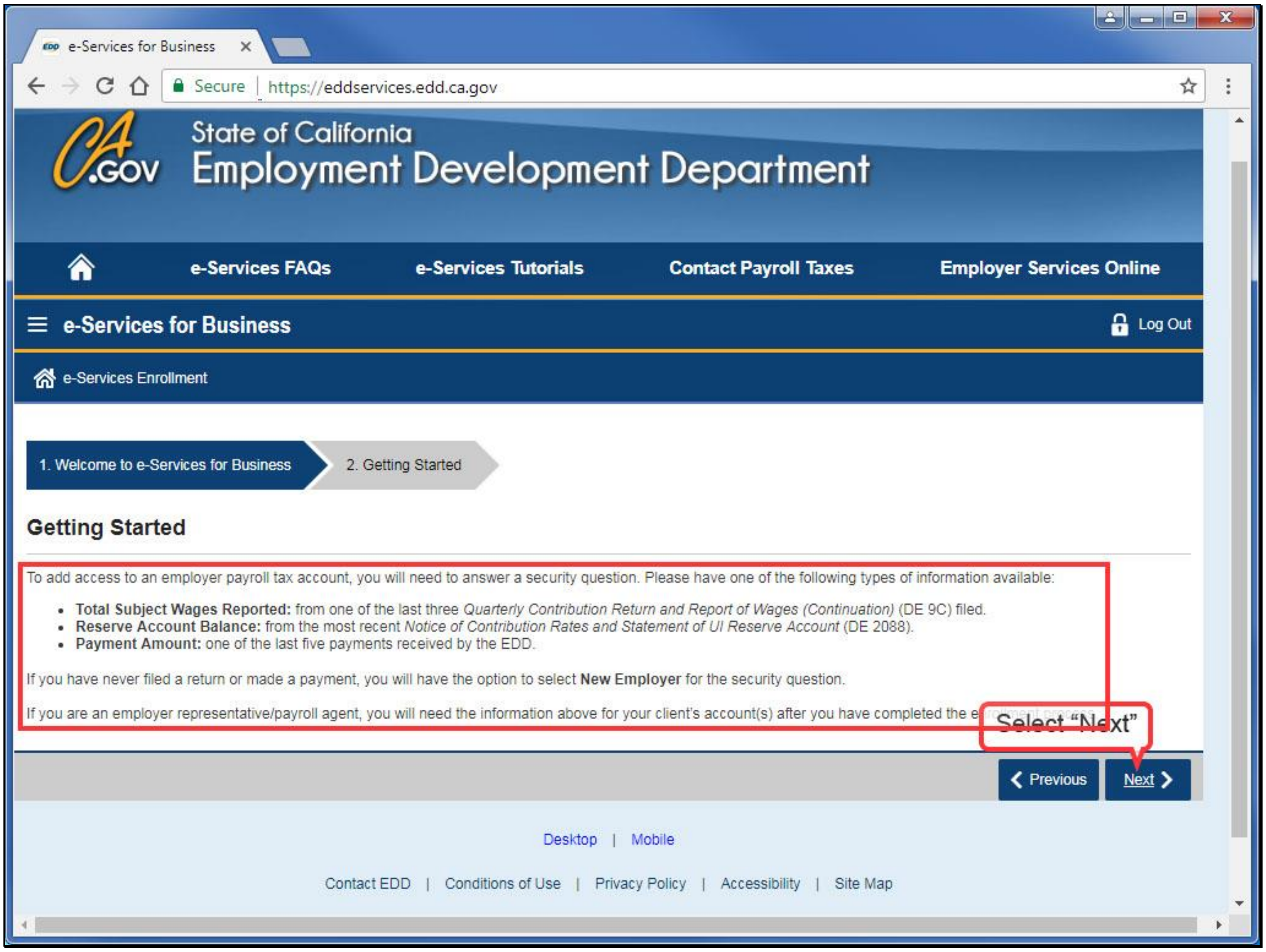
To begin this enrollment, select whether you are an Existing Employer or New Employer. An Existing Employer is an employer who already has an employer payroll tax account number or is an employer representative/payroll agent.

Select "New Employer" if you are an employer and would like to apply for an employer payroll tax account number. If you are an employer representative/payroll agent do not select this option. For this tutorial, we are going to select "Existing Employer."



Slide notes

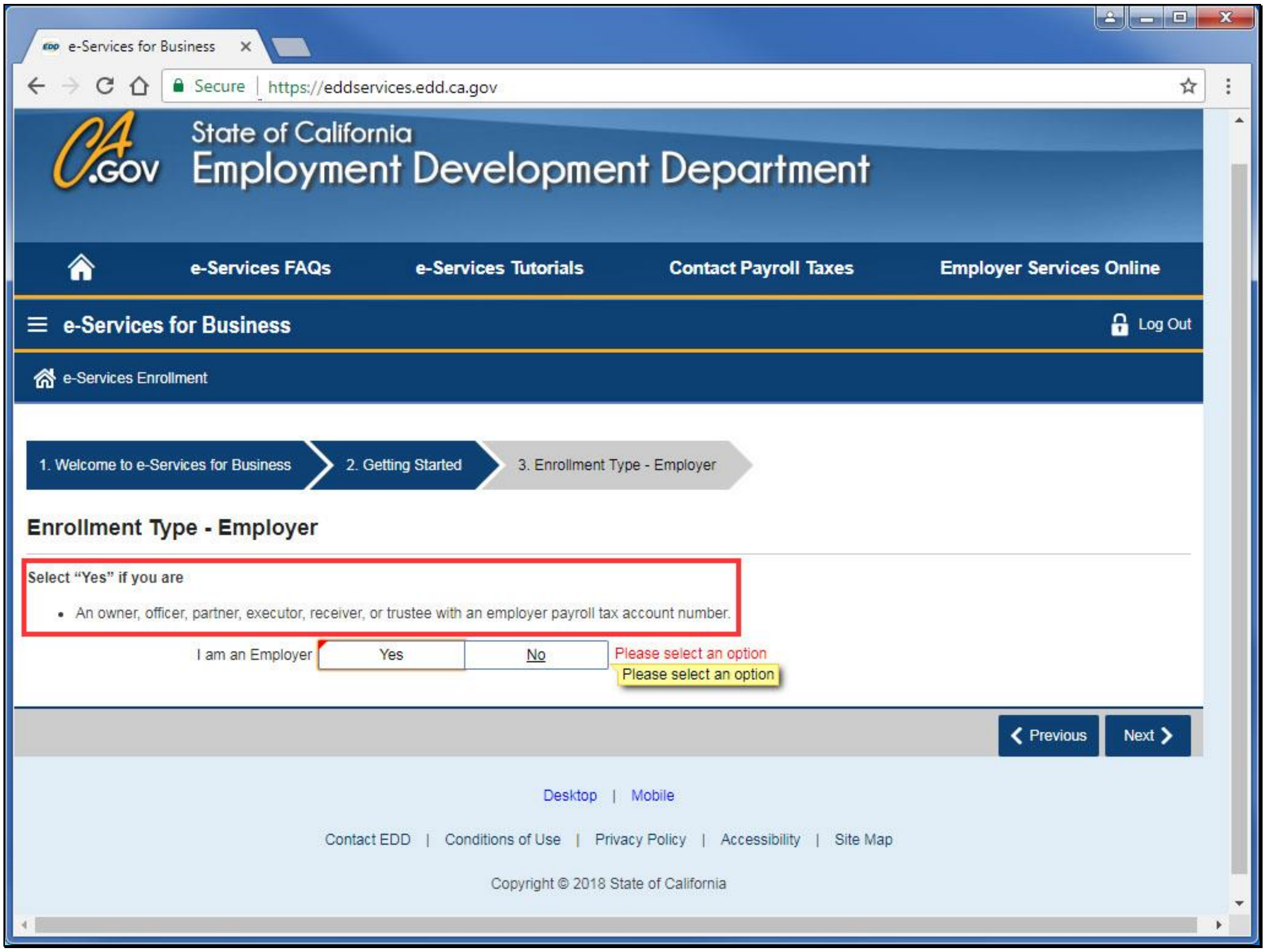
Select "Next" to continue.



Slide notes

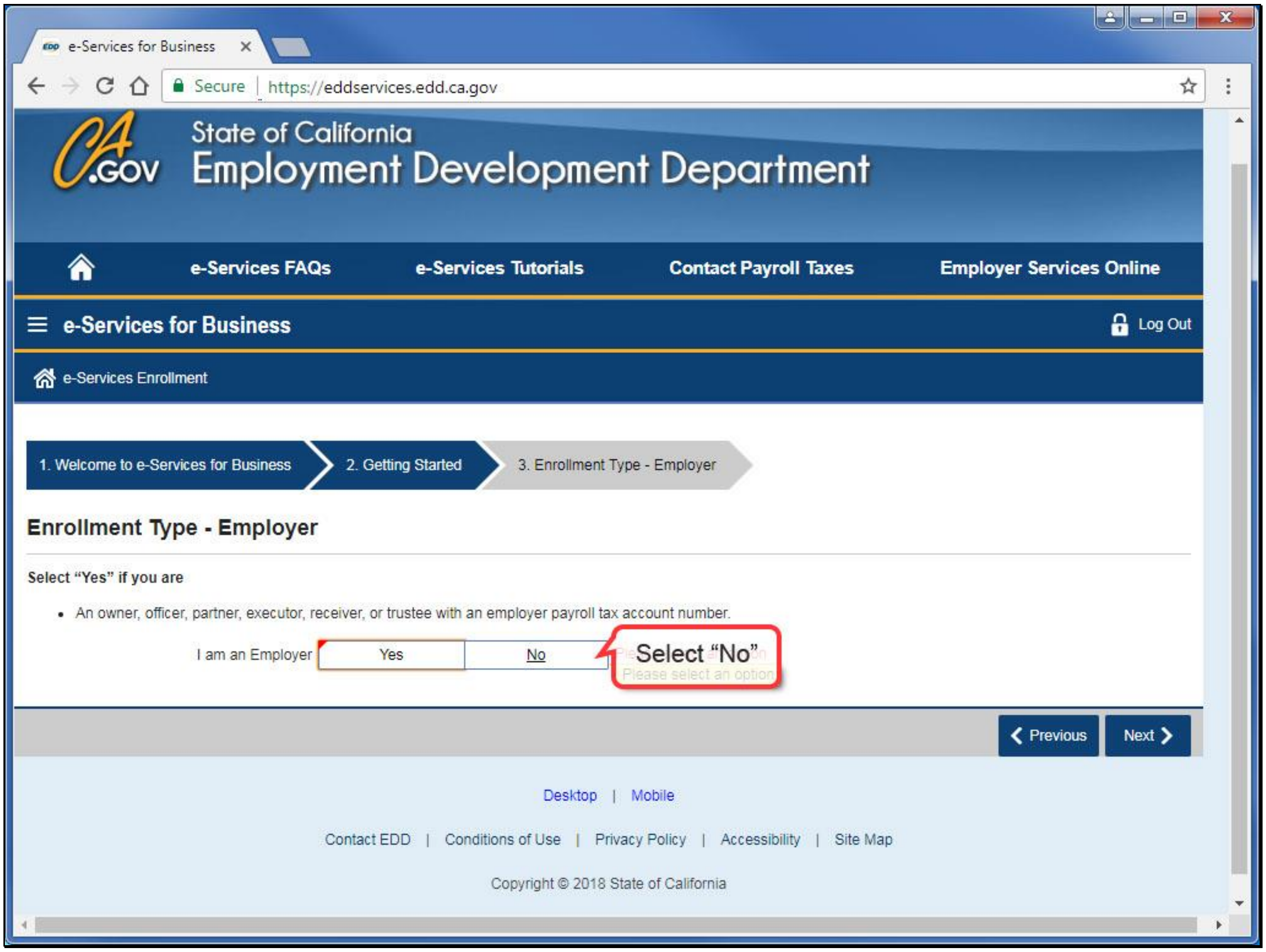
To add access to an employer payroll tax account, you will need to answer a security question. Be prepared to answer one of the questions listed here.

Select "Next" to continue.



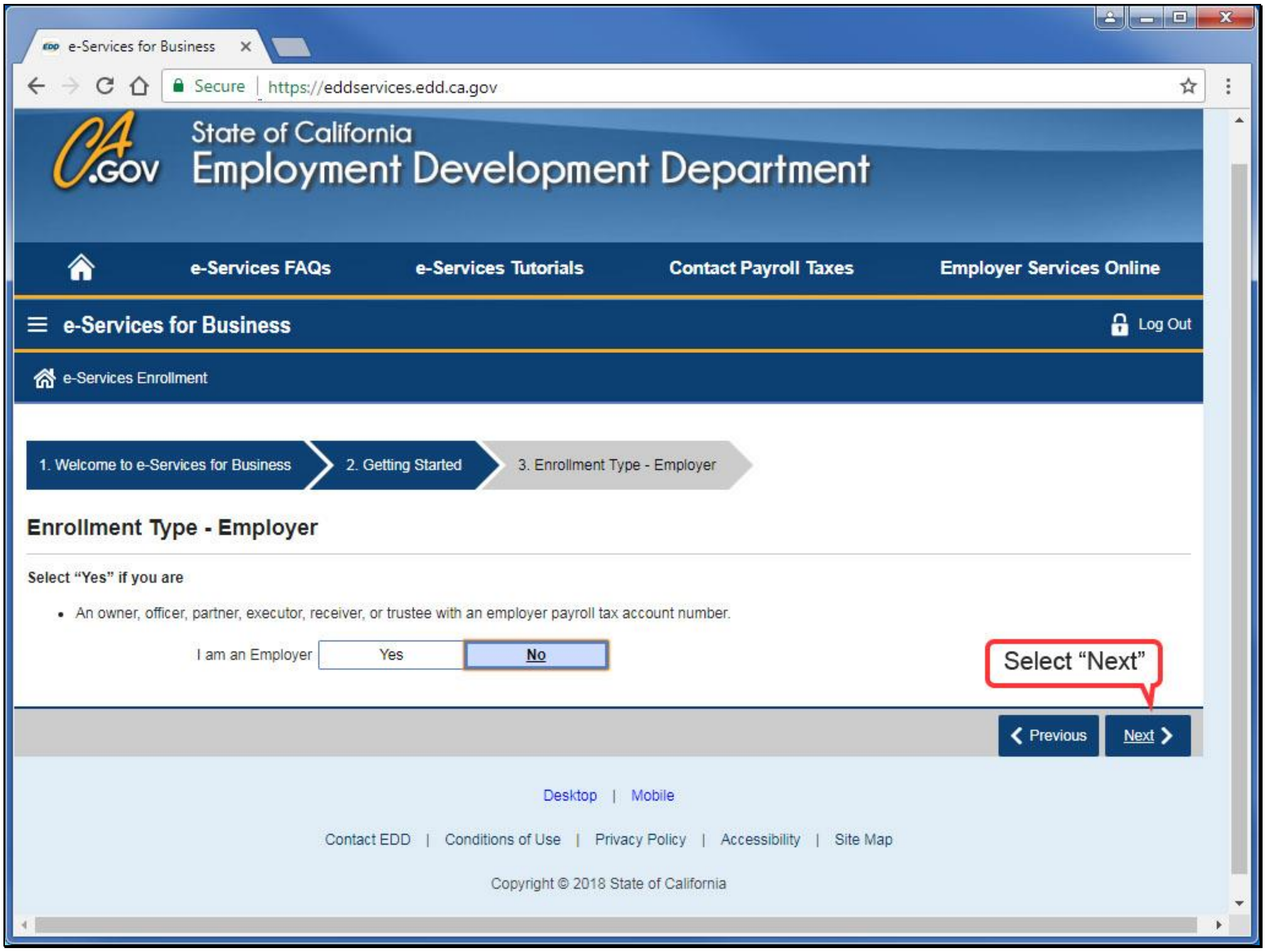
Slide notes

The two types of enrollment are either an "Employer" or "Employer Representative/Payroll Agent." The first one presented is "Employer." Please take a moment and read this important message. Take time to find out what type of enrollment you want to utilize. This is a detailed explanation of the employer type.



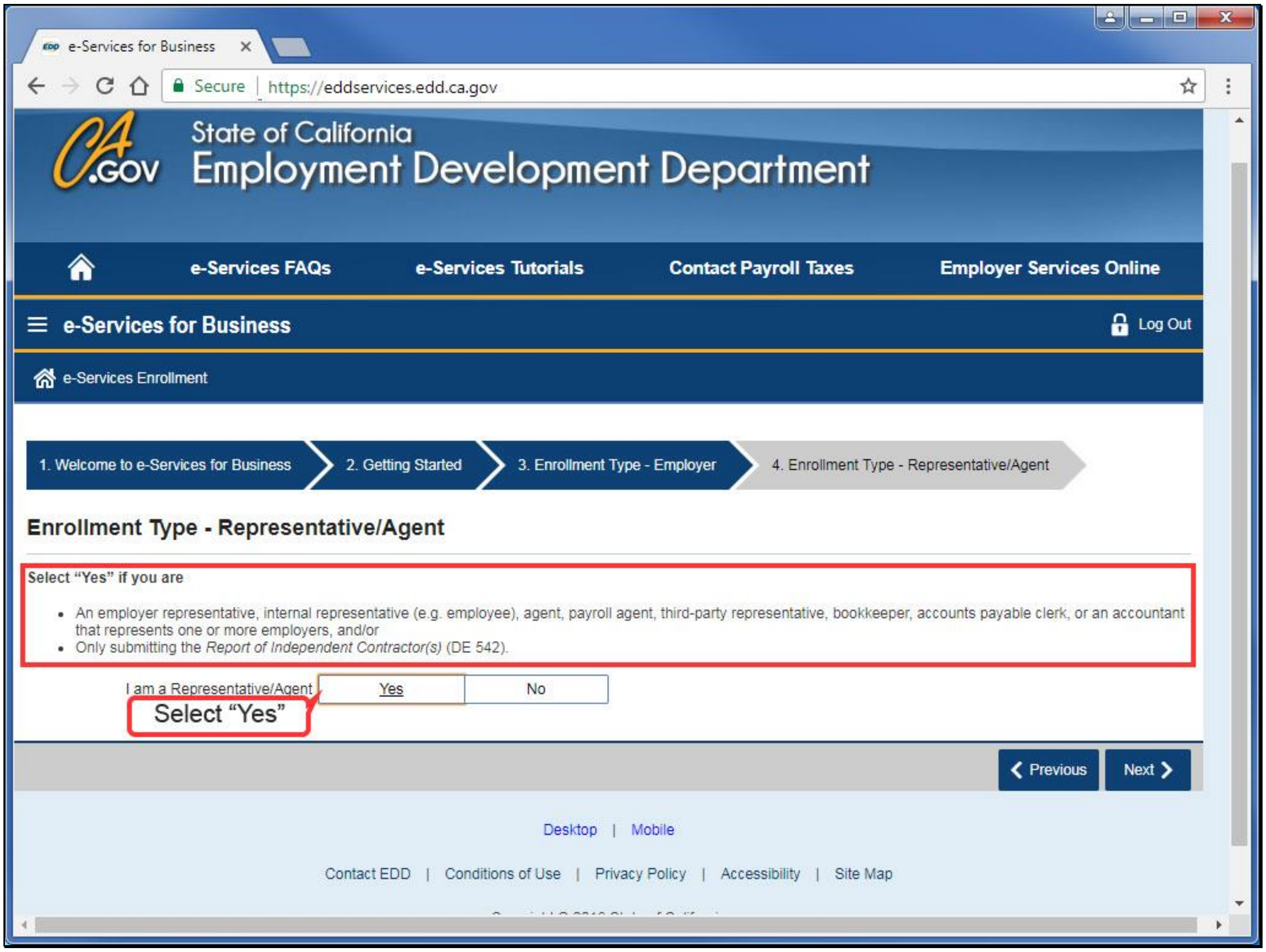
Slide notes

Select "No" for the "I am an Employer" question.



Slide notes

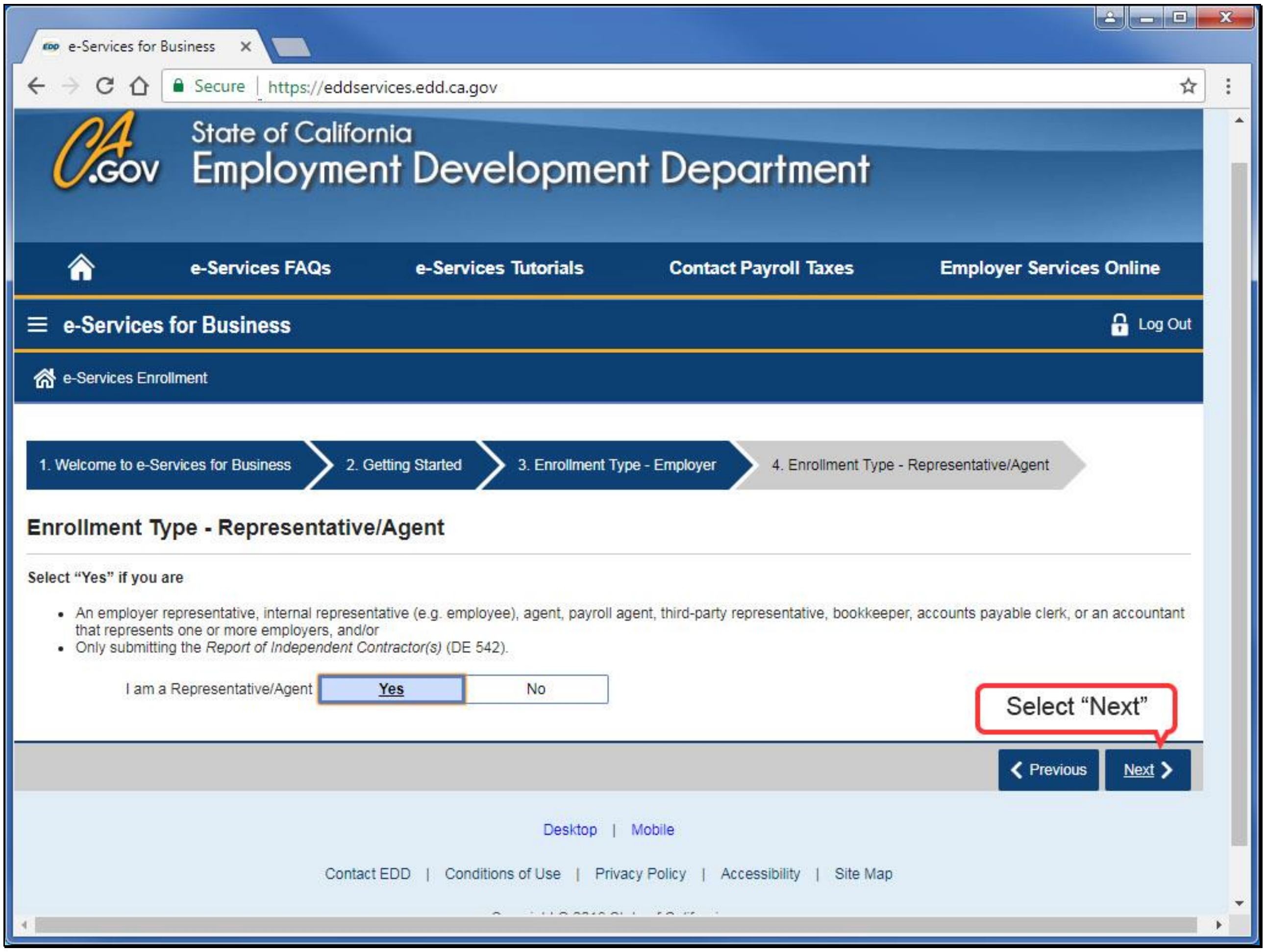
Select "Next" to continue.



Slide notes

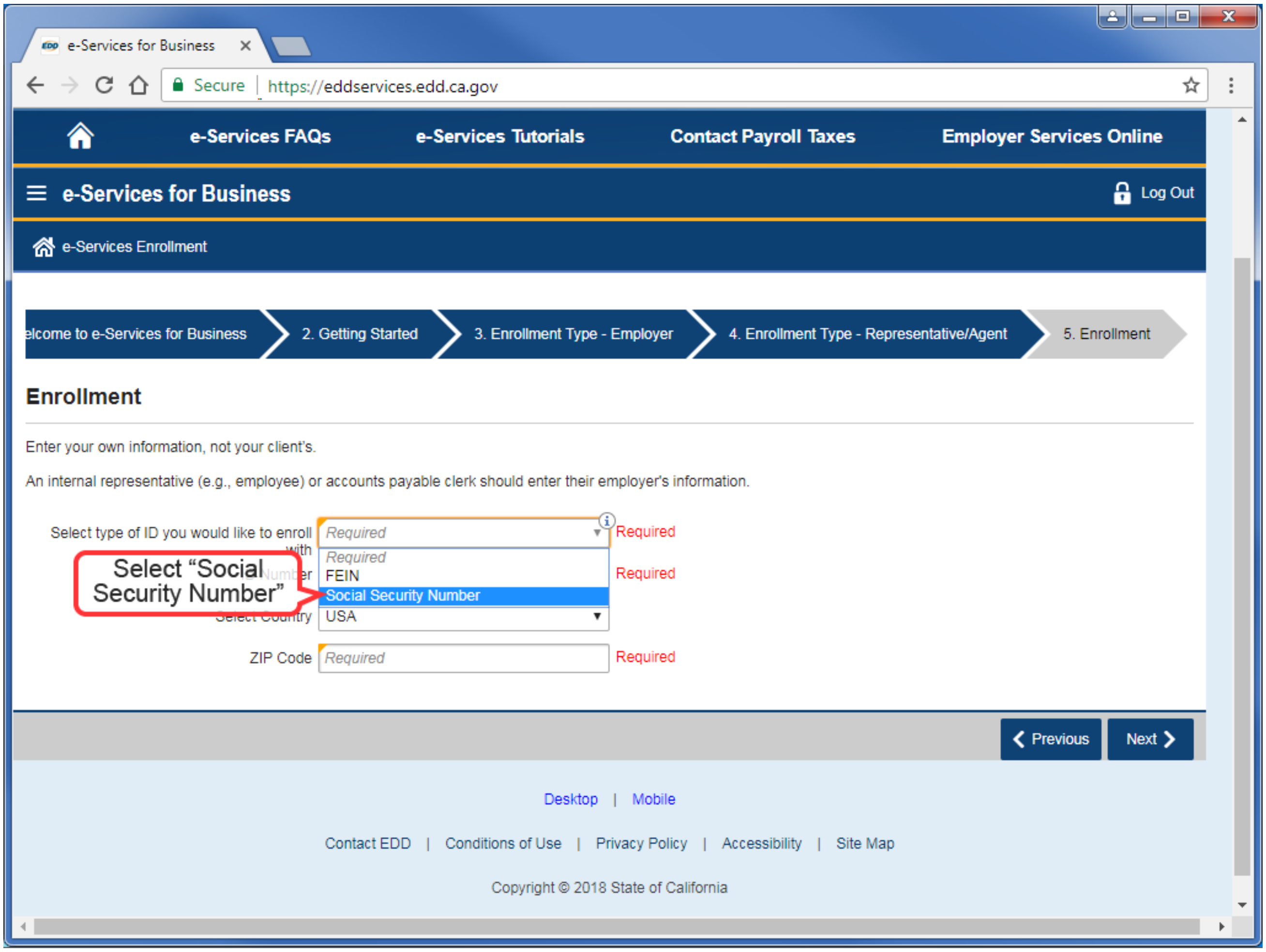
Please take a moment and read this important message. This is a detailed explanation of the "Representative/Agent" choice. For this example, we select "Representative/Agent."

Select "Yes" for the "I am a Representative/Agent" question.



Slide notes

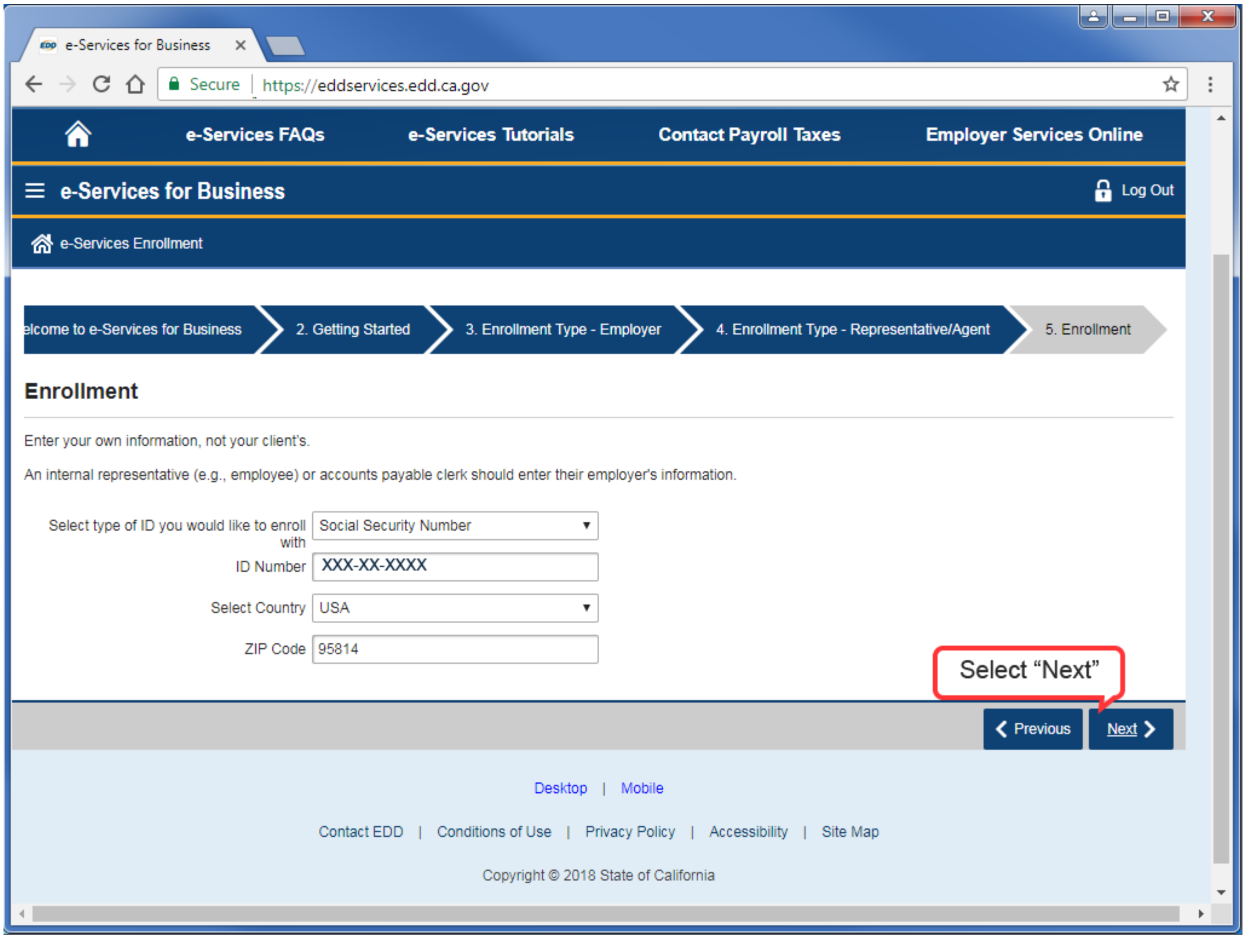
Select "Next" to continue.



Slide notes

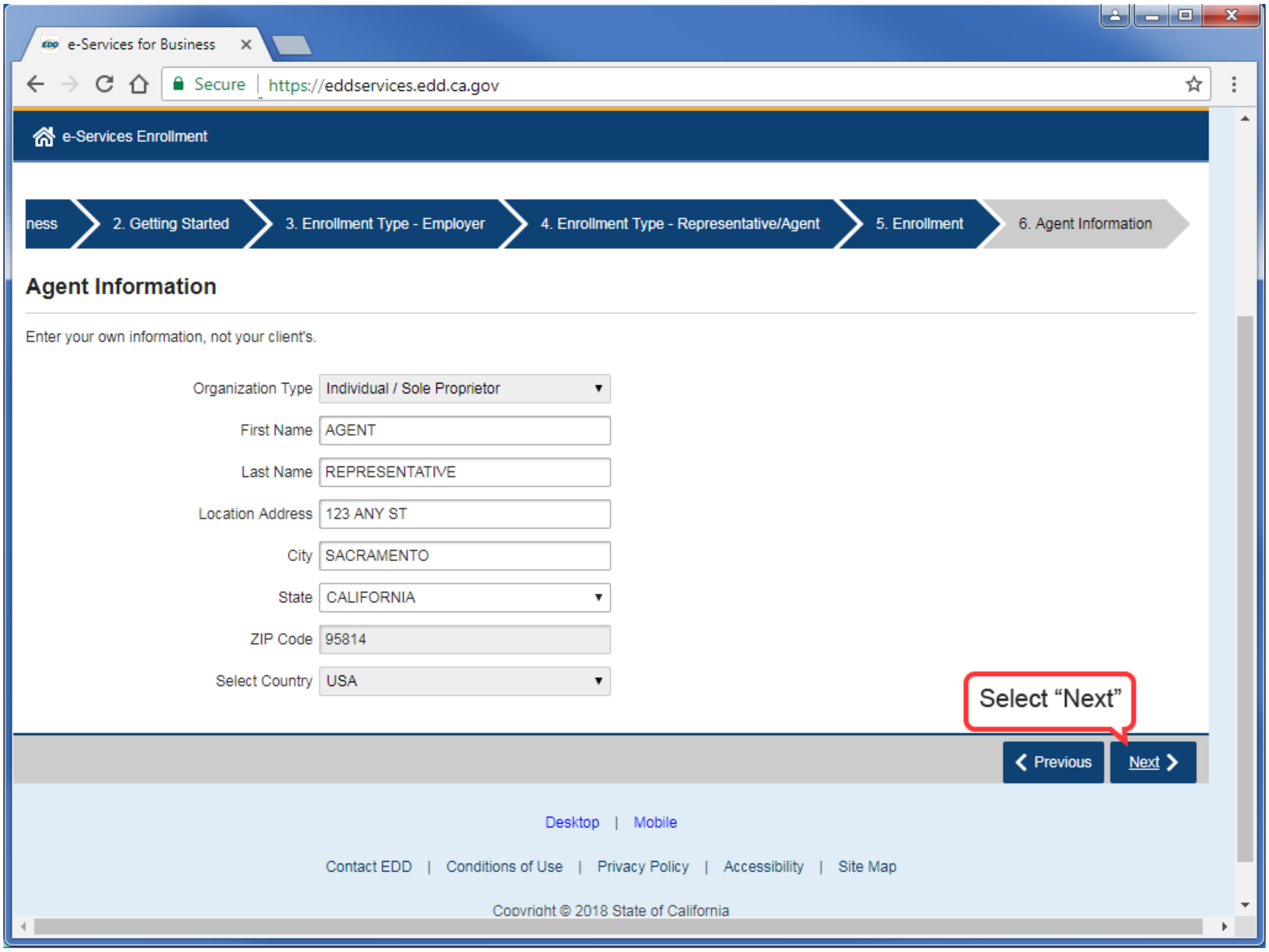
Select the type of ID you would like to enroll with. You have a choice of Social Security number (SSN) or Federal employer identification number (FEIN). If you are currently a business with a FEIN, you may select it.

If you are an individual, you may select Social Security number. For this example, we select "Social Security number."



Slide notes

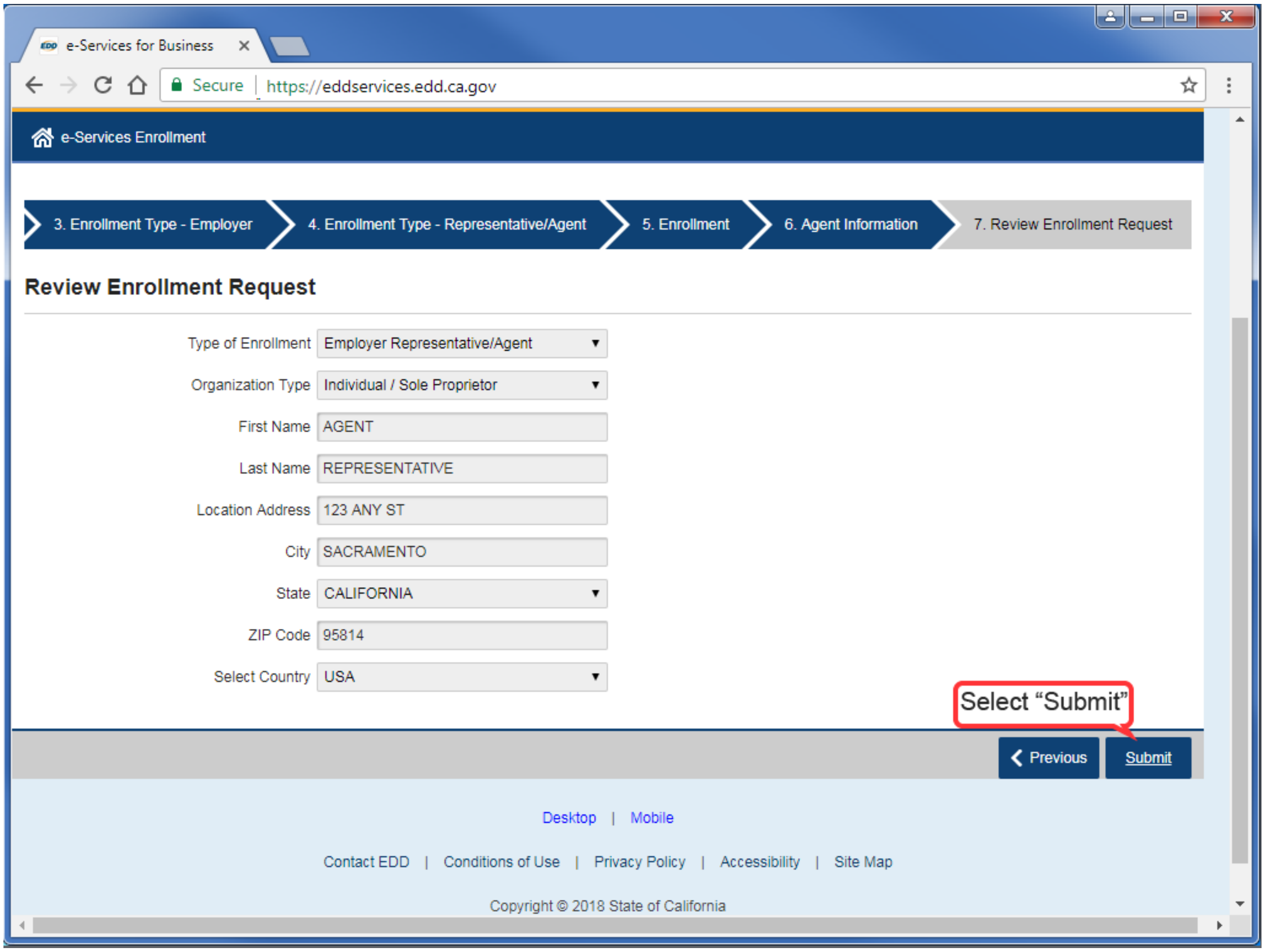
Enter the ZIP Code related to the FEIN or SSN that you entered. When all fields are completed, select "Next" to continue.



Slide notes

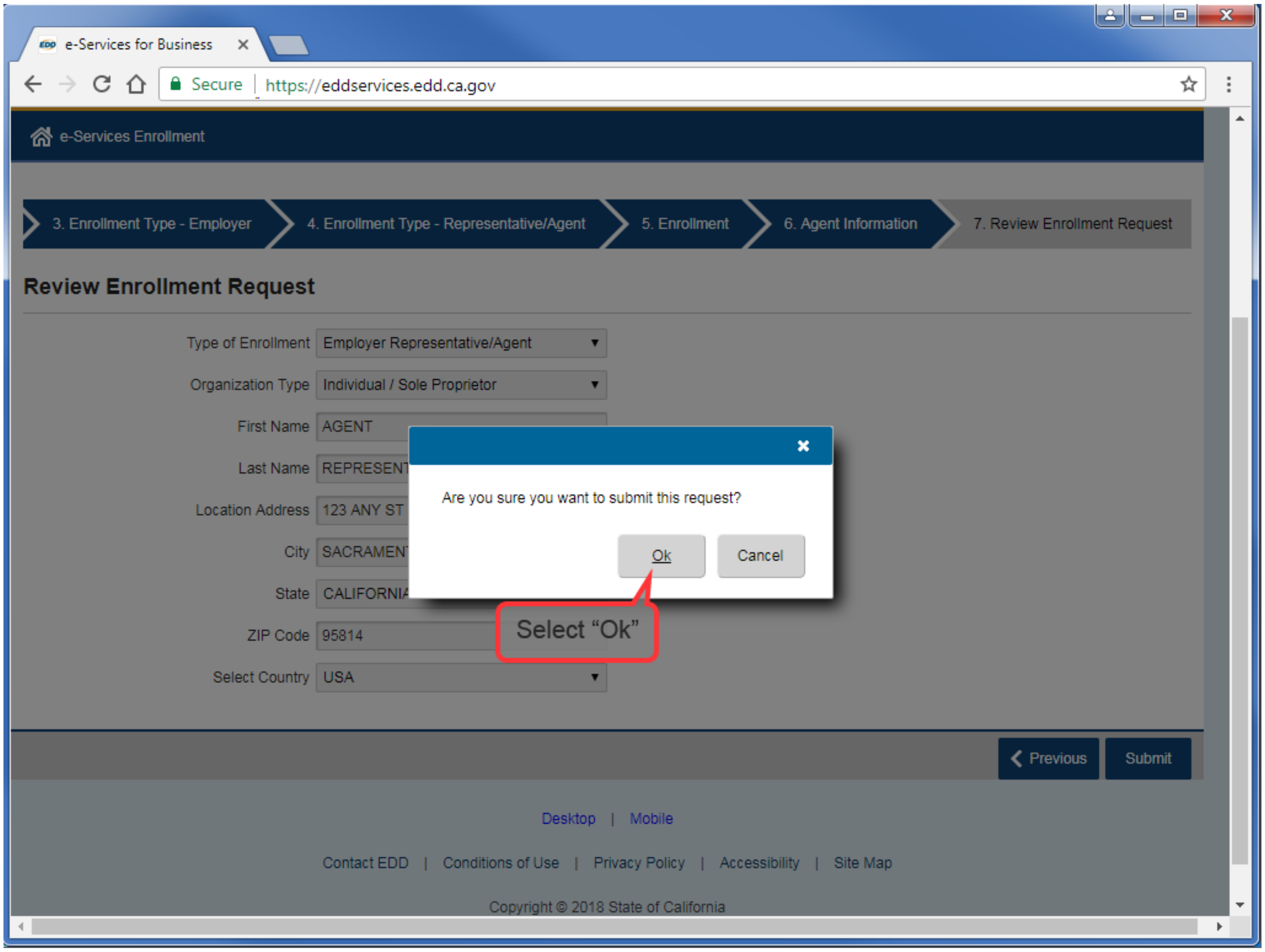
Complete this page with your own information, not your clients.

When the information is completed, select "Next" to continue.



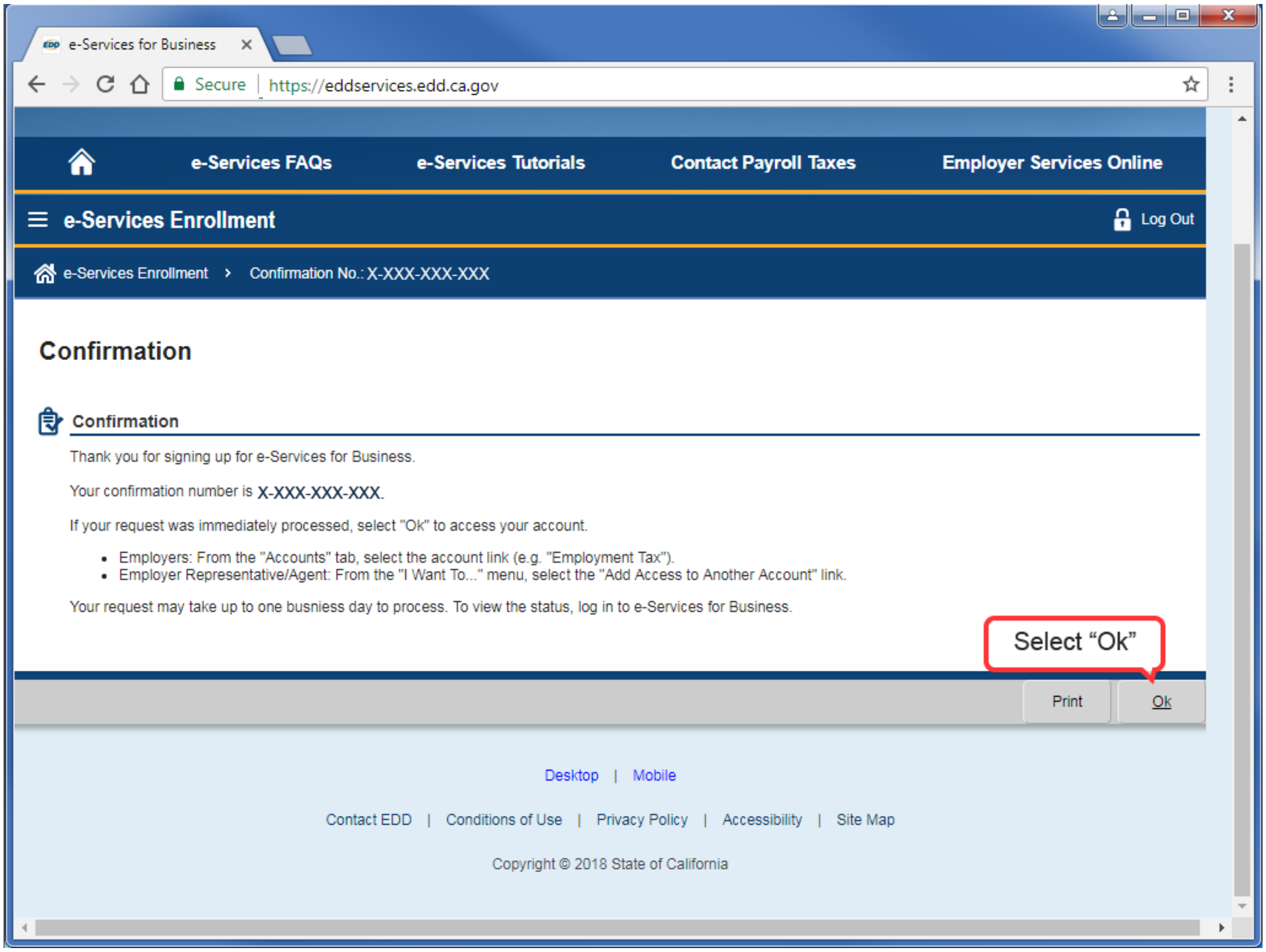
Slide notes

Now you are ready to submit this request. Select "Submit."



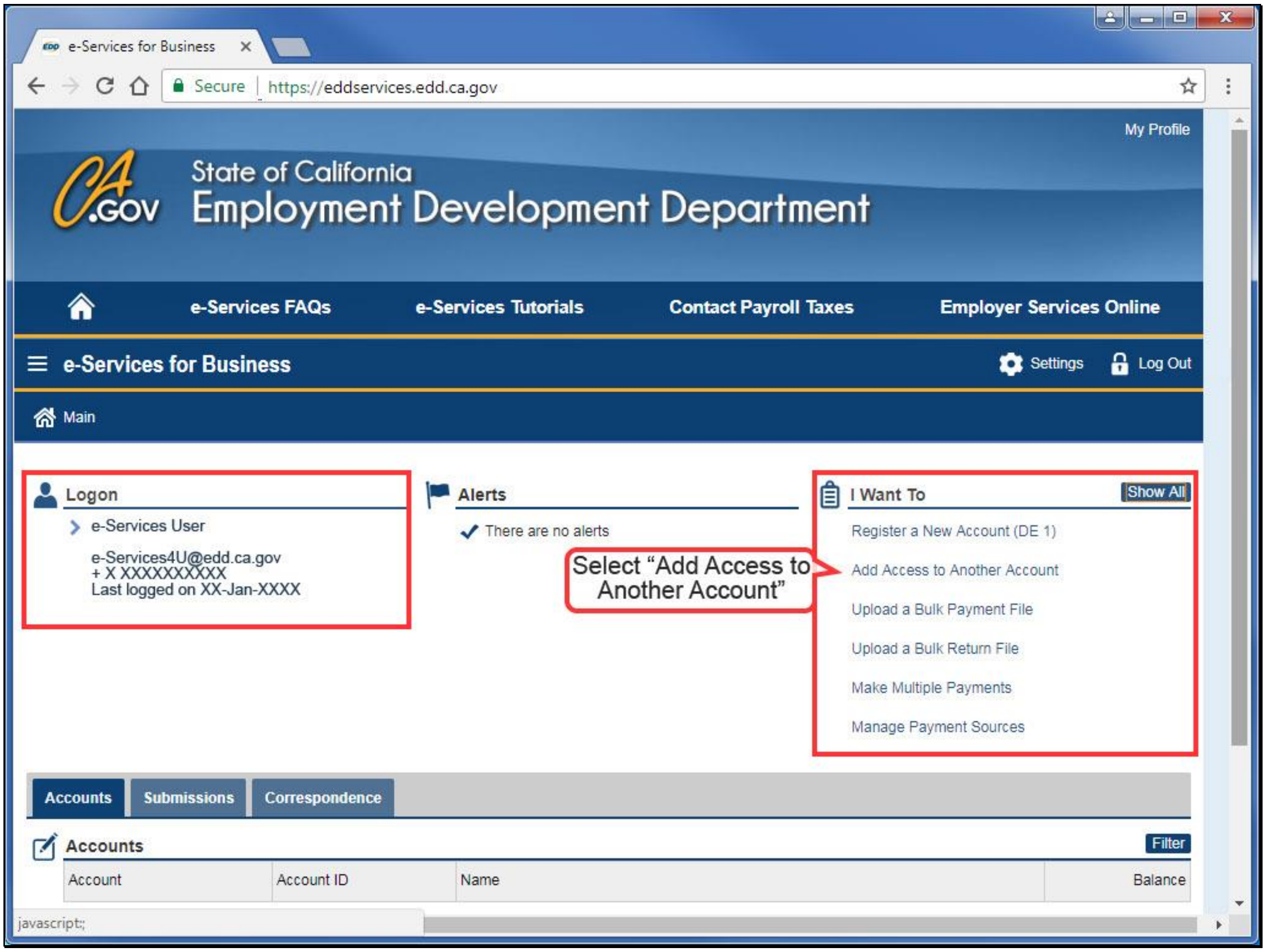
Slide notes

Are you sure you want to submit this request? Select "Ok" to continue.



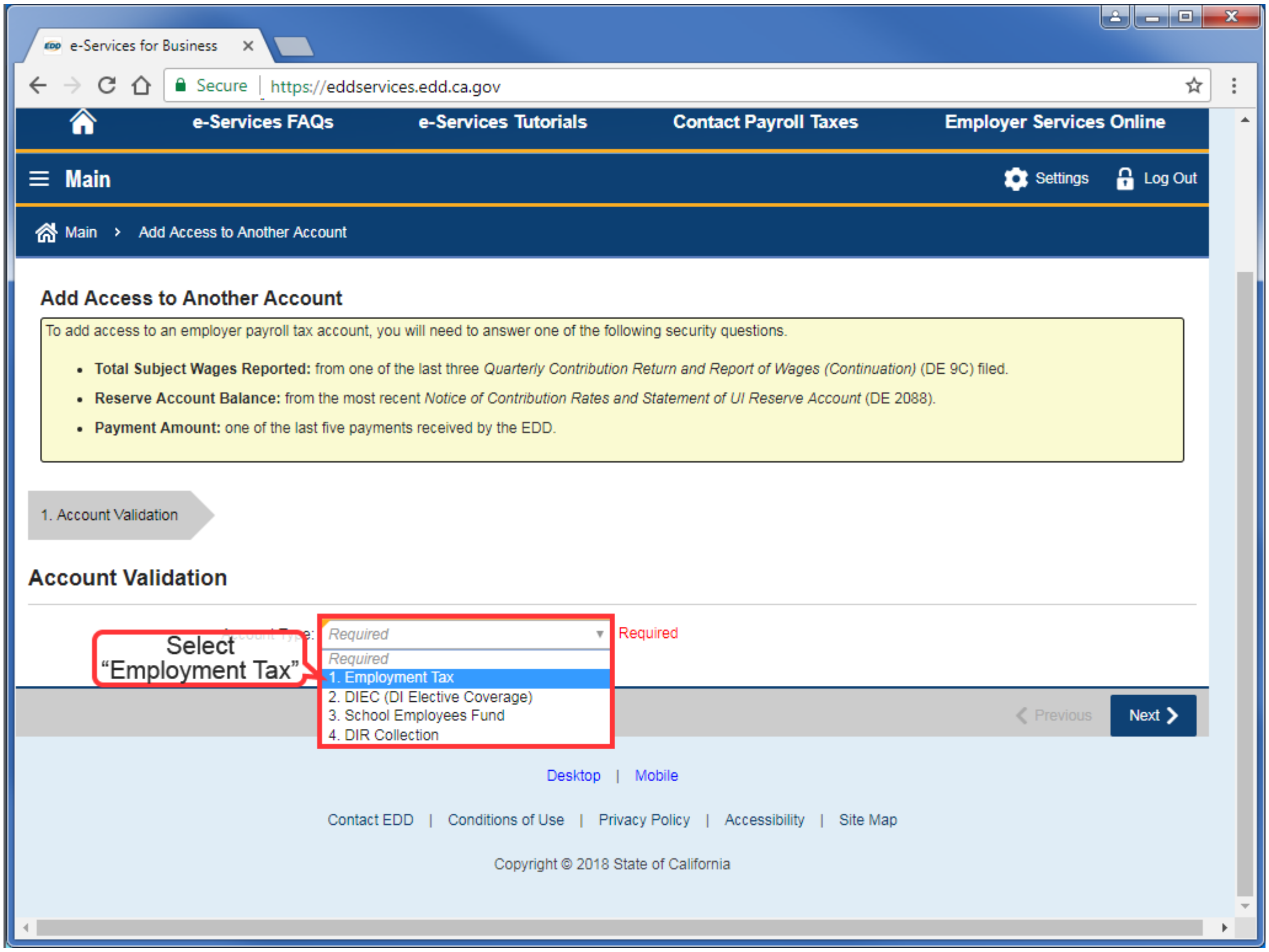
Slide notes

Here is the confirmation page telling you that your enrollment request is being processed. Select "Ok” to return to the e-Services for Business home page.



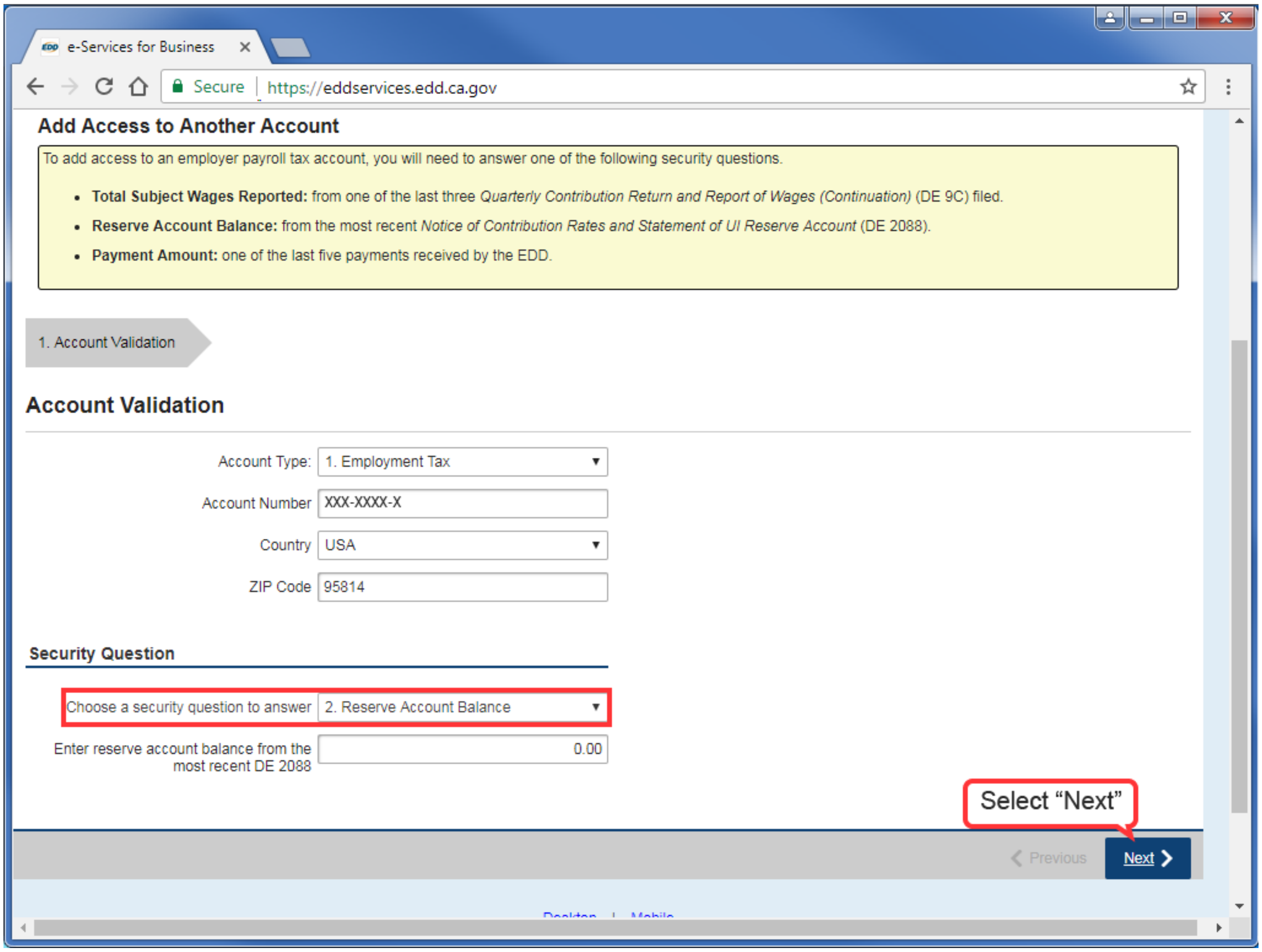
Slide notes

The e-Services for Business home page shows a summary of your enrollment information as the agent. From the "I Want To" menu, select "Add Access to Another Account" to gain access to your client's account. Repeat these steps for each client account number.



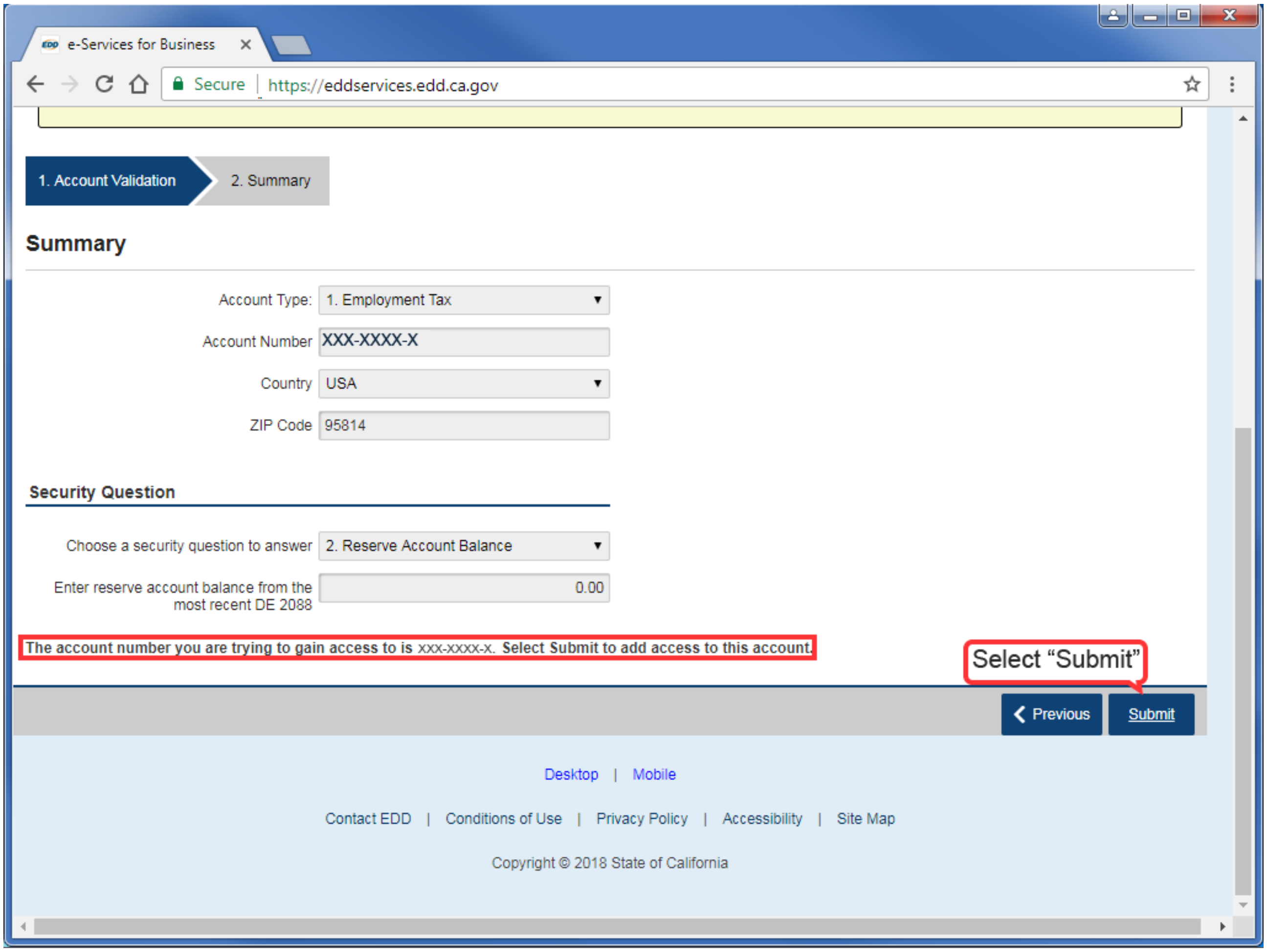
Slide notes

Select "Account Type." For this example, we select "Employment Tax."



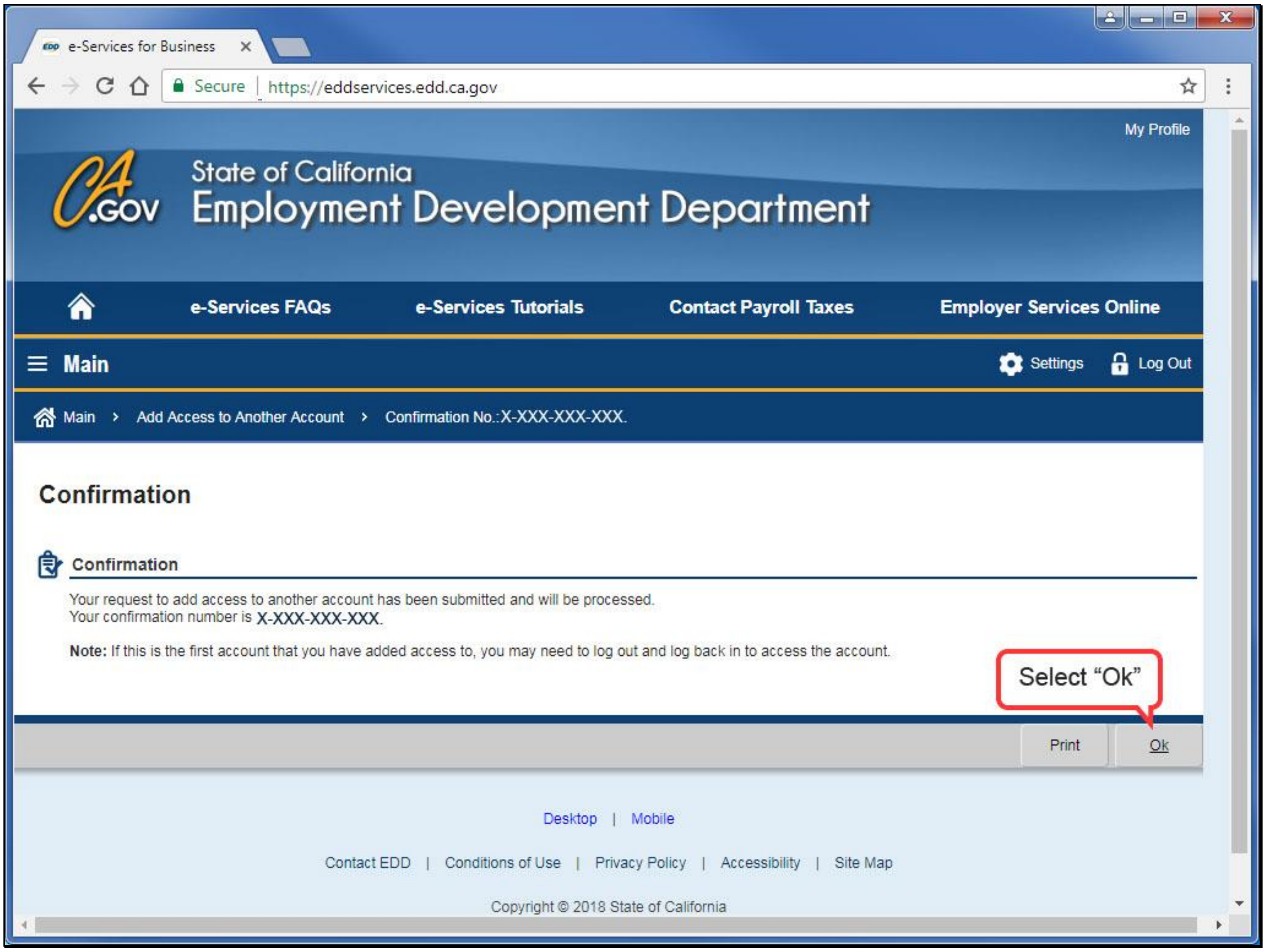
Slide notes

Enter the "Account Number", "Country", and "ZIP Code" then select a security question to answer. For this example, we select "Reserve Account Balance." Select "Next" to continue.



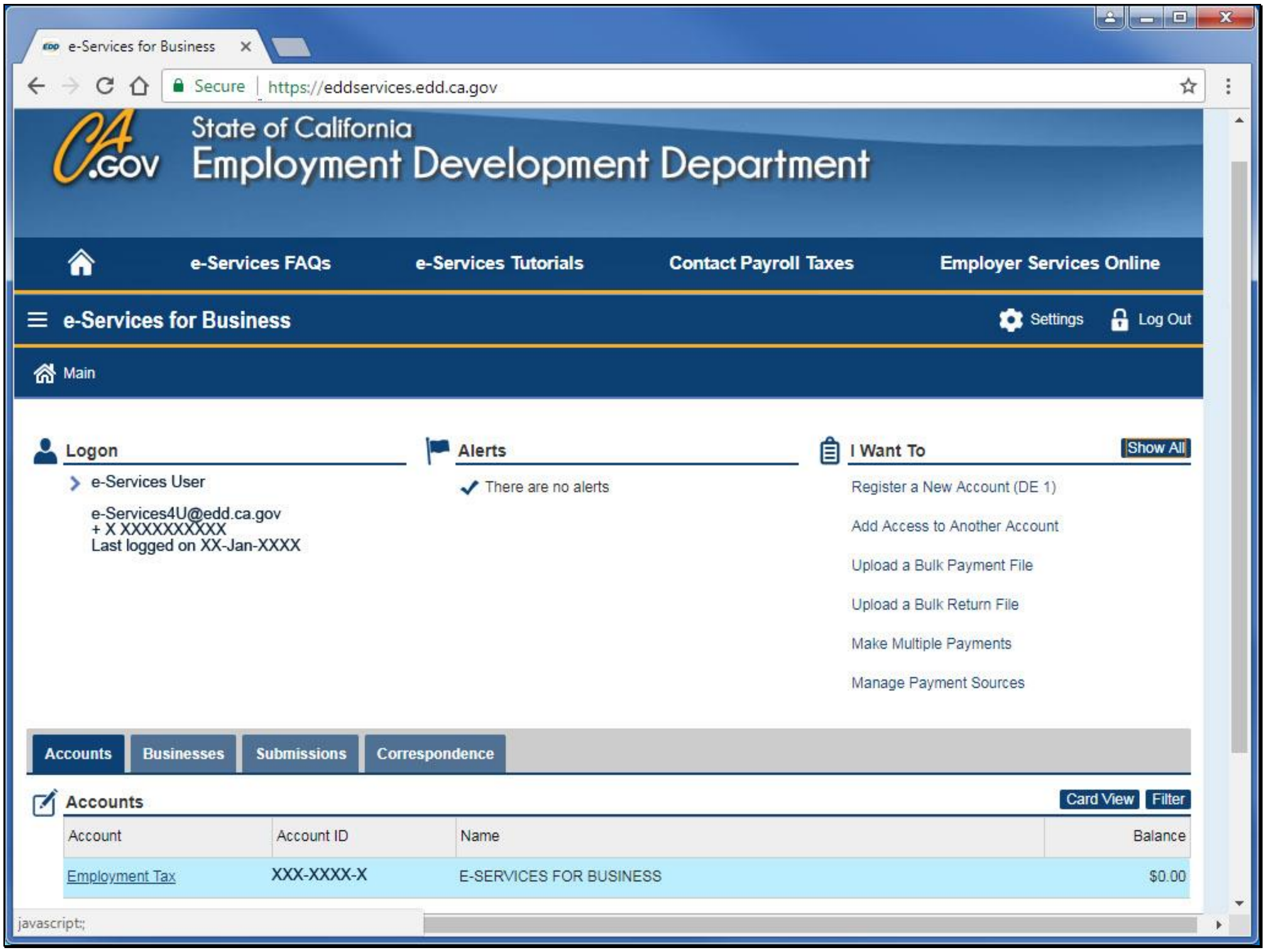
Slide notes

The message at the bottom informs you that you are trying to add access to the specified account. Select "Submit" to add access to this account.



Slide notes

Here is your confirmation number for the request to add access to another account. You can print a copy for your records and then select "Ok" to continue.



Slide notes

You can now see the newly added account located under the “Accounts” subtab on the home page.

There are many other actions on the home page that an employer representative or payroll agent may find helpful for managing multiple accounts. Most of these actions can be accessed by selecting “Show All” next to the “I Want To” menu.

Slide notes

Thank you for taking the time to watch this tutorial on how to enroll and navigate through e-Services for Business as an employer representative or payroll agent.

Be sure to view our other tutorials demonstrating how to file bulk returns, make bulk payments, and the many other actions available in e-Services for Business.

Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.